

Strategic Planning Primer

**Wright Brothers
Institute Collider**

26 Jan 2017

Agenda

A thick, horizontal red arrow pointing to the right, positioned below the 'Agenda' title.

- Introductions
- Why Strategic Planning
- Essential Definitions (Vision, Mission, Goals, Objectives, Tasks)
- The Strategic Planning Process
- A Framework
- Discussion Topics / Q & A

Welcome and Introductions



- Dennis Drayer – Principal and Owner, dldc LLC
 - Analytic strategic helping defense and business teams discover data insights to improve the business and mission
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Business Value Analysis Data, Strategies, Business, & Mission

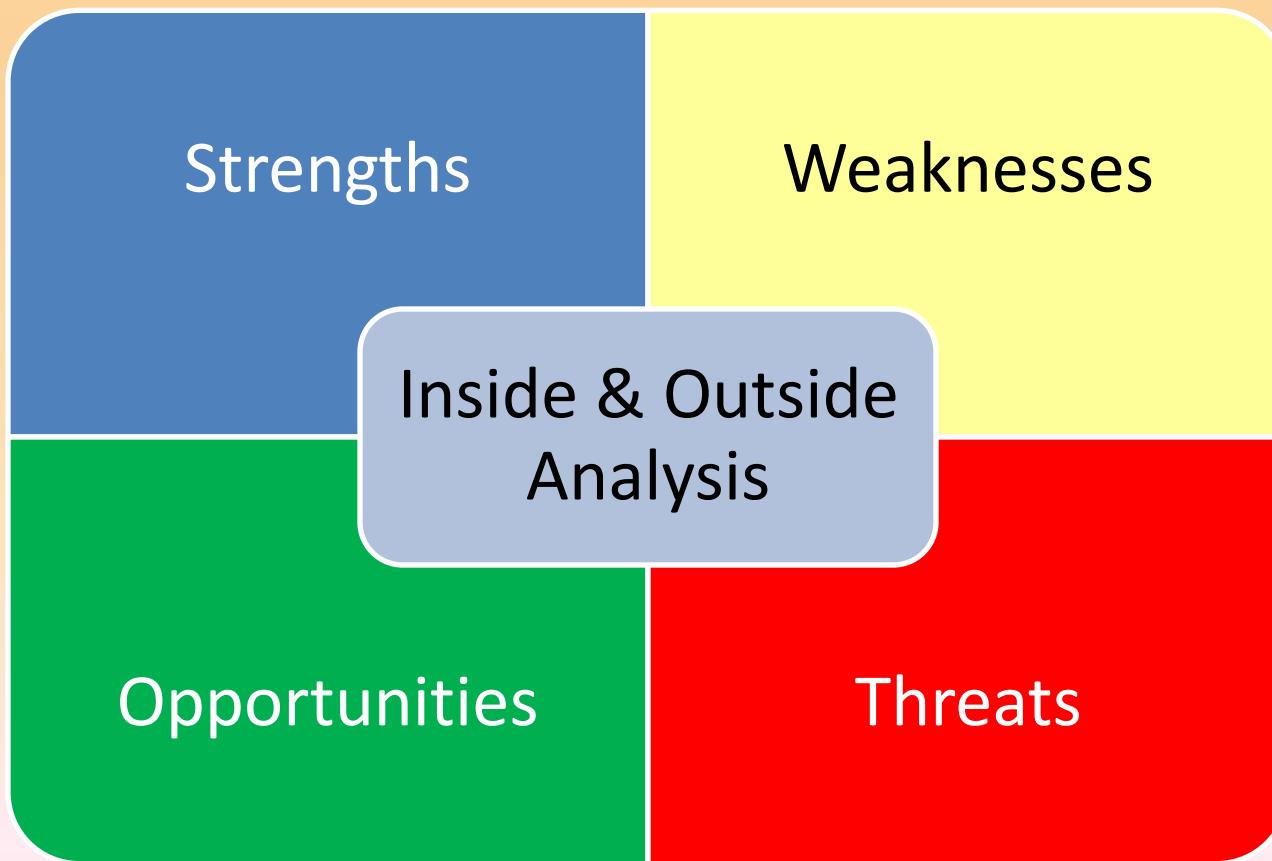
- Four decades of defense, industry, and community service expertise
 - USAF – Operations, Plans/Programs, Acquisition, Legislative
 - Business Information Strategies
 - Professional Service/Industry Consultant/Technical Solutions
 - Defense Account Executive around transportation/supply chain
 - Better, faster decisions by leveraging any/all data
 - Leveraging the data that's really needed to improved the business
 - Deep Analytics, Data Science, Big Data
 - Community Service, Government, and Non-Profit Volunteer
 - Information, Technology, Business Improvement

Leadership needs to:

(Owner, Principal, President, CEO, core trusted advisors)

- define the corporate **Vision** and
- clearly articulate the **Mission**

SWOT Analysis



Vision

Vision: an approach of future direction and business make-up

- Guiding concept, the client focus it must acquire, prime position it should occupy in the market, the abilities it plans to develop
- Brief, Simple to understand, Motivate employees and customers.

Vision statements inspire people to dream

Examples

- In 5 years, we aim to double our profits and become leaders in the computer software industry
- We aim to see our products and applications used worldwide with every PC equipped with our SWs
- Without compromising on quality, we will rule the software market in 10 yrs
- Do THIS better than anybody by helping people become THAT
- Do THAT so we stay in business until the boss can retire and sell the company
- Make and sell THOSE so we can support the family for the next 30 years
- Own this Global Market for the next 50 years

Mission Statement



Ground the vision in practical terms

- Describes what the group is going to do and why it's going to do that

Mission Statements look at the big picture

- More concrete and action-oriented than vision statements
- Don't go into a lot of detail,
- Broadly hint at how organization might fix a problem or reach these goals

Mission statements are:

- Concise (generally one sentence)
- Outcome-oriented (fundamentals your organization works to achieve)
- Inclusive (not limiting in strategies/sectors of business/community involved)

Mission statements inspire people to action

Mission Statement



Mission Statements: Define the business sector a company operates in and sets out its key purpose

- Set out what the company does and why,
- How it conducts business and
- Identifies key stakeholders (customers, employees, shareholders).
- Helps employees understand where their contributions fit in the company objectives.

Examples

- Promote a healthy life-long, lifestyle though a comprehensive family and community initiative
- Create a thriving arts community through development of skills, markets, education, support, and cultural pride
- Develop safe routes to school for every district elementary /middle school through collaborative planning, community action, and policy advocacy
- Promote a strong, inclusive, vibrant, and self-sustaining community by connecting and valuing people, ideas, and resources

Goals and Objectives



Identify Goals that support the mission

- Goals: Actions that improve the business (otherwise don't waste time & money on it) , and...

Identify Objectives that support each goal

- Objective: A major milestone or action required to achieve a goal
 - SMART : Specific, Measurable, Achievable, Realistic, Time-Constrained
- Generally, affect specific business areas -- need to pull key stakeholders into Strategic Planning process that can speak for those areas
 - Decision-makers (front office)
 - Operations, including sales, business development
 - Finance
 - Logistics Support/Manufacturing/Professional Service
 - Personnel/HR/Training
 - Contract/Legal
 - Information management

Task: A discrete event/action or activity based on doctrine, standard procedures, mission analysis or concepts that may be assigned to provide a capability.

- Measurable, discrete, enables a mission or function to be accomplished
- Only listed once
- Should not include conditions

Measures of Performance: Basis for describing task accomplishment

- Criterion define acceptable levels of task performance; standard expresses acceptable proficiency
- Each task has a standard w one or more measures and criterion for each measure
- These standards provide a basis for planning, training, and evaluating training and unit readiness.
- Simple and reflect how a task contributes to mission success
- Focus on the output, results of performance, or process to achieve the task



Five Steps in Strategic Planning Process

Goal Setting

- Clarify the vision

Analysis

- Gather information/data relevant to accomplish vision
- Understand business needs, its strategic direction, initiatives that will grow it
- Internal/external issues affecting goals/objectives
- Strengths/ weaknesses/opportunities/threats to determine current resources to help reach defined goals/objectives
- Identify areas where external resources are needed

Strategy Formulation

- Review analysis to determine current resources to reach defined goals/objectives
- Identify areas where external resources are needed
- Prioritize issues by importance to success, then formulate a strategy to approach each business/economic situation
- Develop alternative approaches for each step of the plan



Five Steps in Strategic Planning Process

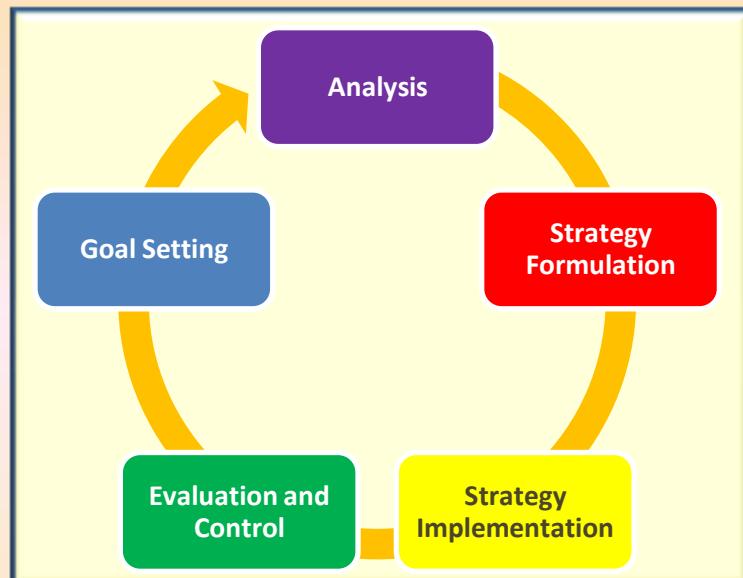


Strategy Implementation

- The action stage of the process
- Everyone in the organization must be clear on their responsibilities and duties and how that fits into the overall goal.
- Any resources/funding (for the plan) must be secured; once in place and employees are ready, execute the plan

Evaluation and Control

- Define parameters to be measured, which should mirror the goals set in first stage
- Measure actual results against the plan
- Monitor internal/external issues to react to substantial changes in your business environment and make correction actions when needed
- If corrective actions are not successful, repeat the strategic management process



Notional/Generic Planning Framework

- **Clearly define core missions/business -- be prepared to change**
 - Refine your core mission/business
 - Develop a disciplined approach to change
- **Better define customer base & operational support rqts**
 - Assess and validate your customer base
 - Confirm the business requirements to support operations
 - Develop a disciplined plan to change the requirements as business operations grow/change
- **Team closely with mission partners in executing our missions**
 - Work with current and potential mission/business partners to efficiently execute business requirements that are not core business activities
 - Collaborate with process owners and policy makers that affect your mission/business
 - Verify/implement support agreements with business/mission partners

Notional/Generic Planning Framework

- **Cultivate an adaptive team and a culture of the highest professional standard**
 - Foster deliberate team development/training/growth/promotion
 - Support your team's ability to get the business accomplished
 - Foster a professional workplace
- **Fully leverage opportunities to communicate**
 - Deliver the vision and business message across the corporation
 - Communicate routinely and effectively
- **Improve cyber awareness and network security**
(esp for most companies/organizations that support IT activities)
 - Integrate cyber capabilities
 - Cultivate cyber proficiencies
 - Provide a stable and secure cyber infrastructure
 - This doesn't mean build an IT empire

DIY vs Outsource

Why you need a facilitator from outside the company/organization



Time and Resources

- Not in the job jar
- Other priorities
- Stay on task

Accountability

- Drive the framework/process
- Coach, Facilitator, Accountant, Slide Maker, Administrator

Tell the Emperor/CEO/President He Has No Clothes

- Fear of Repercussion
- Yes Men/No Men
- But, Sir.....
- That's why you hired me!

DIY vs Outsource

Why you need a facilitator from outside the company/organization

Sometimes the players are too close to the fire

Need someone who has NOT drunk the kool-aide to ask:

- .. the Questions that No One Wants to Ask
- .. why?
- .. seriously?
- .. is that goal/objective/task realistic, achievable, specific, measurable, time-constrained
- .. how does this fit with the corporate vision or the CEO's priorities

Force stakeholders/participants to explain to someone outside the circle

Who, What, When, Where, Why, How

- Sometimes there are good reasons
- Sometimes not so good reasons
- Verbalizing brings a sense of ownership
- Verbalizing can bring a realization there is something wrong

Must leverage stakeholder representatives

- Facilitator/Coach/Support Team are NOT the business experts/SMEs
- Internal process owners who are empowered to speak for their area
- Rising Stars who will inherit the future

A Framework

Strategic Planning is not an overnight or one-week-&-done process

- CEO/President set stage with Vision and Mission Statements
- Several summit sessions w/ Key Stakeholder/Business Area reps
 - Analyze strengths, weaknesses, opportunities, threats
 - Analyze existing strategic plans to identify changes in the environment
 - Analyze, update, & revise Goals
 - Analyze, update, & revise Objectives/OPR/OCRs to reach goals
 - Identify Tasks/Task Owners needed to reach objectives
 - Identify measures to determine if goals/objectives/tasks are on track
- **If the Plan will just collect dust on a shelf, don't waste time & \$\$**

Focus on your **CORE** Business

Outsource NON-Core processes to real experts

(e.g. HR, Information Technology, Training)

Leadership T's



- **Trust** - give them the stick, get the hell out of the way, accept the result if it's mostly going where you need to be, lots of praise (and listen)
- **Teach** - share insights, what works/ doesn't work, be open to ideas, keep end game in mind (and listen)
- **Tell** - set expectations, who has what tasks, what they need to get the job done (and listen)
- **Talk** - about where you need to go - share your vision, goals (and listen)

Questions & Contact Information

If you have questions, need assistance with your Corporate Strategic Plan, Vision, Goals, and Objectives, or want to begin the Strategic Planning process contact:



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